holler

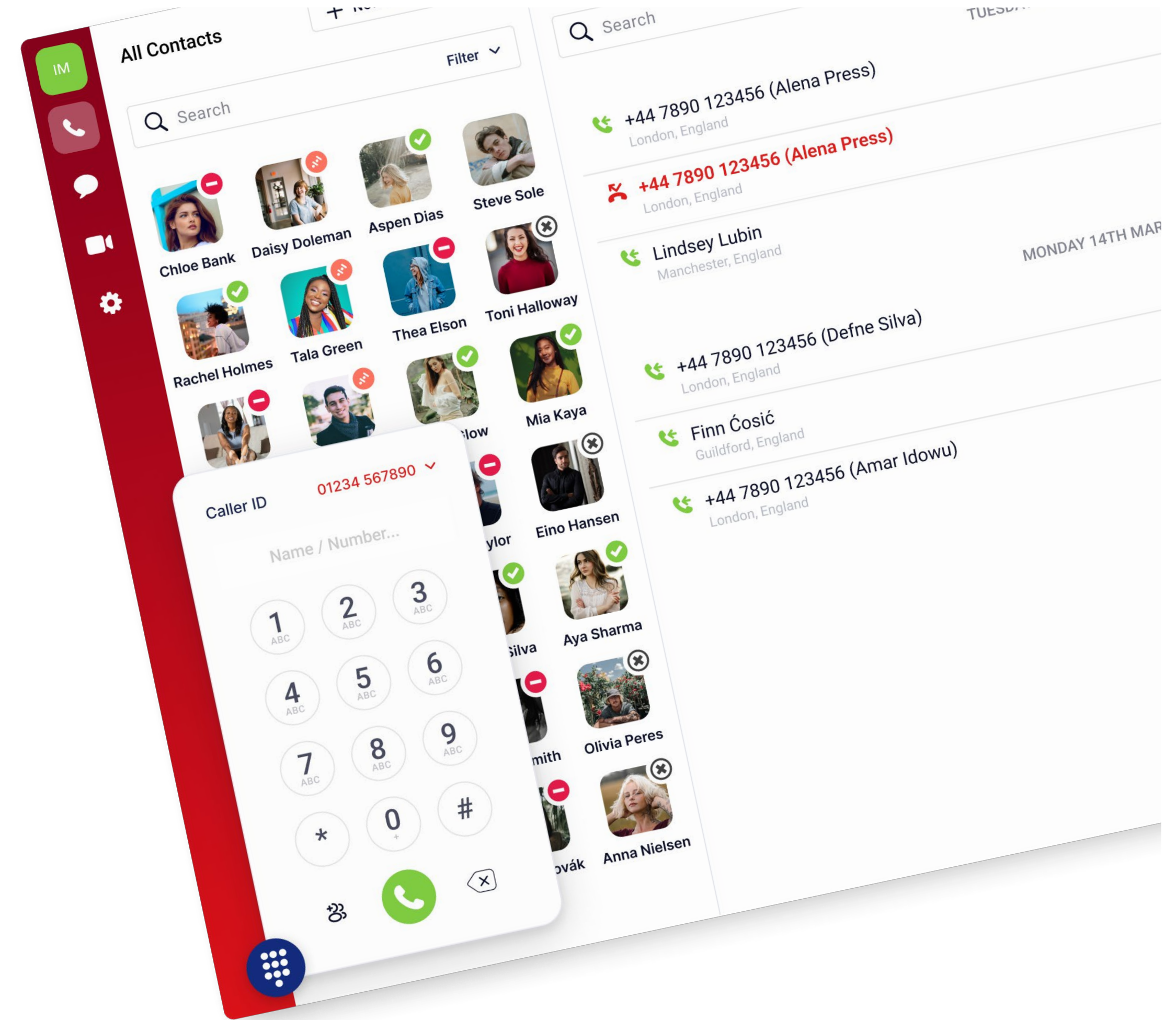**...technology at work**

Quick Start Guide

For Windows & Mac

About the CallSwitch One App

The CallSwitch One desktop application allows users to use their devices as extensions of their work phone. It offers a flexible alternative to using a physical desk phone, enabling users to make and receive calls, send and receive instant messages, share files, view call history, and manage their CallSwitch One settings from any location, whether on the go, in an office or working remotely. This guide will help you navigate the menus and provide basic instructions for making calls, sending messages and utilising some other features.

CallSwitchOne™

GET IT ON **Windows 10**

GET IT ON **macOS**

GET IT ON **Linux**
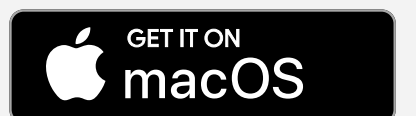
Calls and Contacts View (Default)

1 Menu Bar

- **a** User Settings
- **b** Calls
- **c** Chats
- **d** Settings

2 Contacts section

3 Search Contacts
Filter by Internal, Phonebook, Department or Hunt Group

4 Change Caller ID

5 Call History section

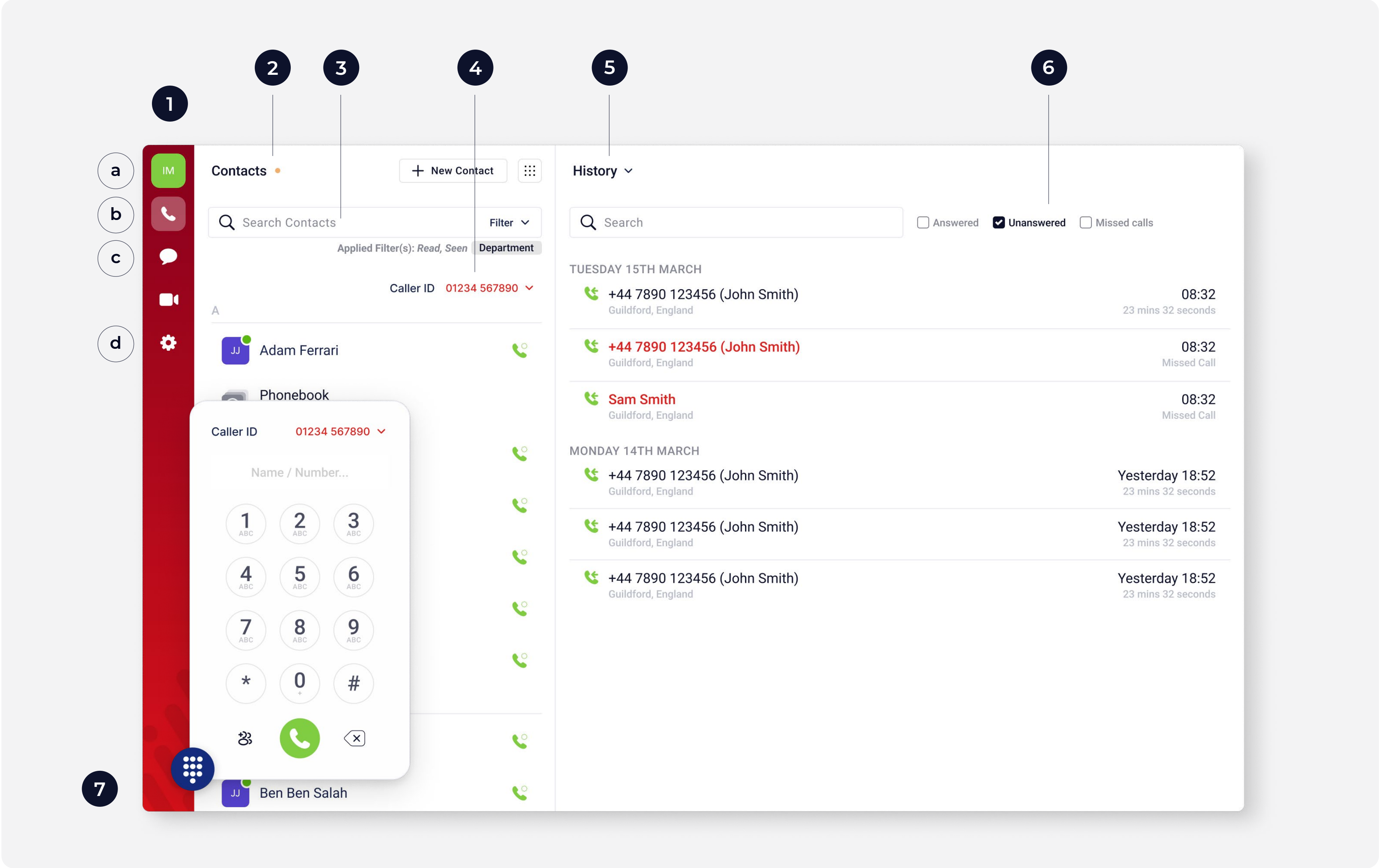**6 Search Call History**
*Filter Inbound, Outbound and Internal*

7 Dialpad - opens on click

2

Call Handling

Calls can be placed by clicking on the **green** phone icon ↗ next to a **Contact** or **Call History** event in the app.

1 You can dial a telephone number manually by opening the dialpad in the bottom left-hand corner ⊞ . Input the number you wish to dial using the number keys and then press the **green** phone button at the bottom of the dialpad to place the call.

2 You can select the **Caller ID** that you want to display on the outbound call using the drop-down box on the top-left hand corner of the dialpad.

3 You can use the dialpad to place a call from another device that is registered to your extension by selecting the **Device** from the drop-down in the top right-hand corner.

4 You can also initiate calls to your internal contacts by simply dragging and dropping their profile picture from your **Contact list** anywhere onto your dialpad.
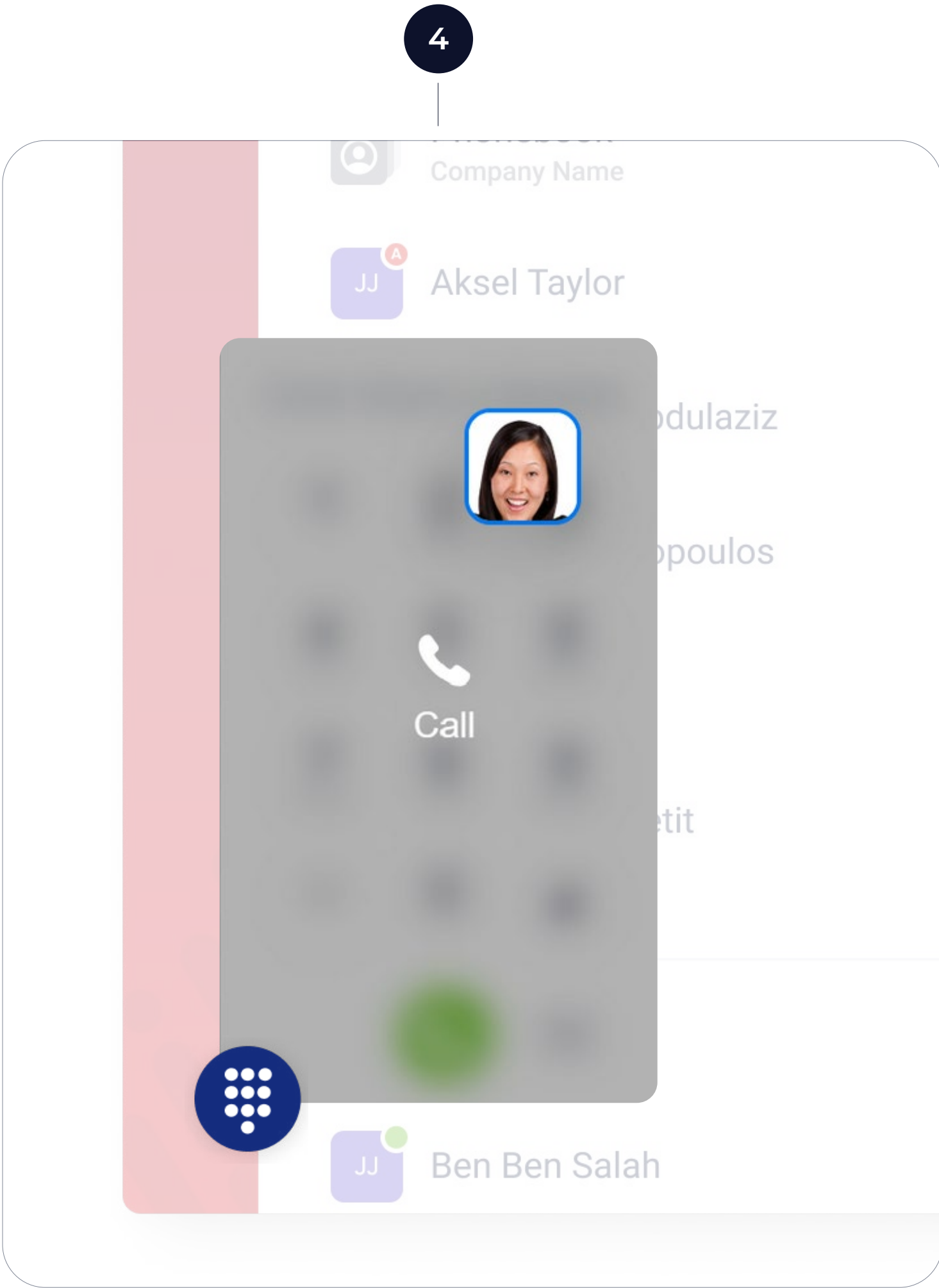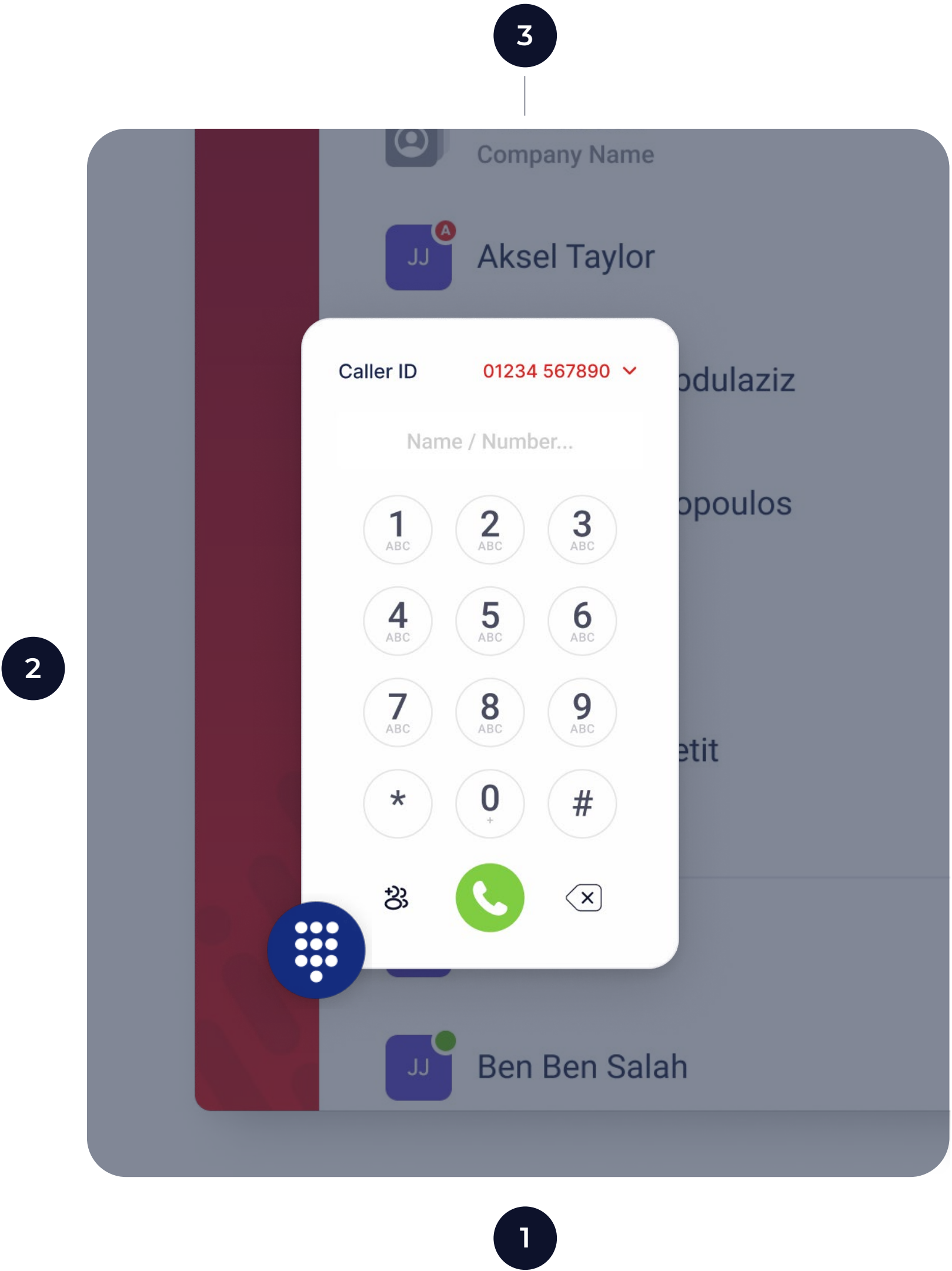
In-call options and Call Transfer

1 When on a live call, you can **Mute** your microphone, bring up the **Keypad** for DTMF/short code input, switch the audio output to **Speaker** and initiate a second call by pressing **Add Call**. You can also place a live call on **Hold** or **Transfer** the call to another user.

2 If you have multiple devices registered to your extension, you can switch the device that you are having a conversation on using the **Device** drop-down in the bottom right.

3 To transfer an active call, press **Transfer** to bring up a list of contacts, then select the user you wish to transfer the call to or enter a name or external number in the box provided.

4 You will then be presented with the transfer method and destination which you can **Confirm** at the bottom of the dialpad to initiate the transfer process, or **Cancel** to return to the original call.

5 You can choose the call transfer method (**Blind** or **Attended**) from the drop-down box provided. **Note**: Your default Transfer method can be changed by going to **Settings > Calls > Transfer Preference**.

6 When on an active call, you can also start a new call or transfer the active call to an internal contact by dragging and dropping their profile picture from your **Contact** list over to your dialpad.
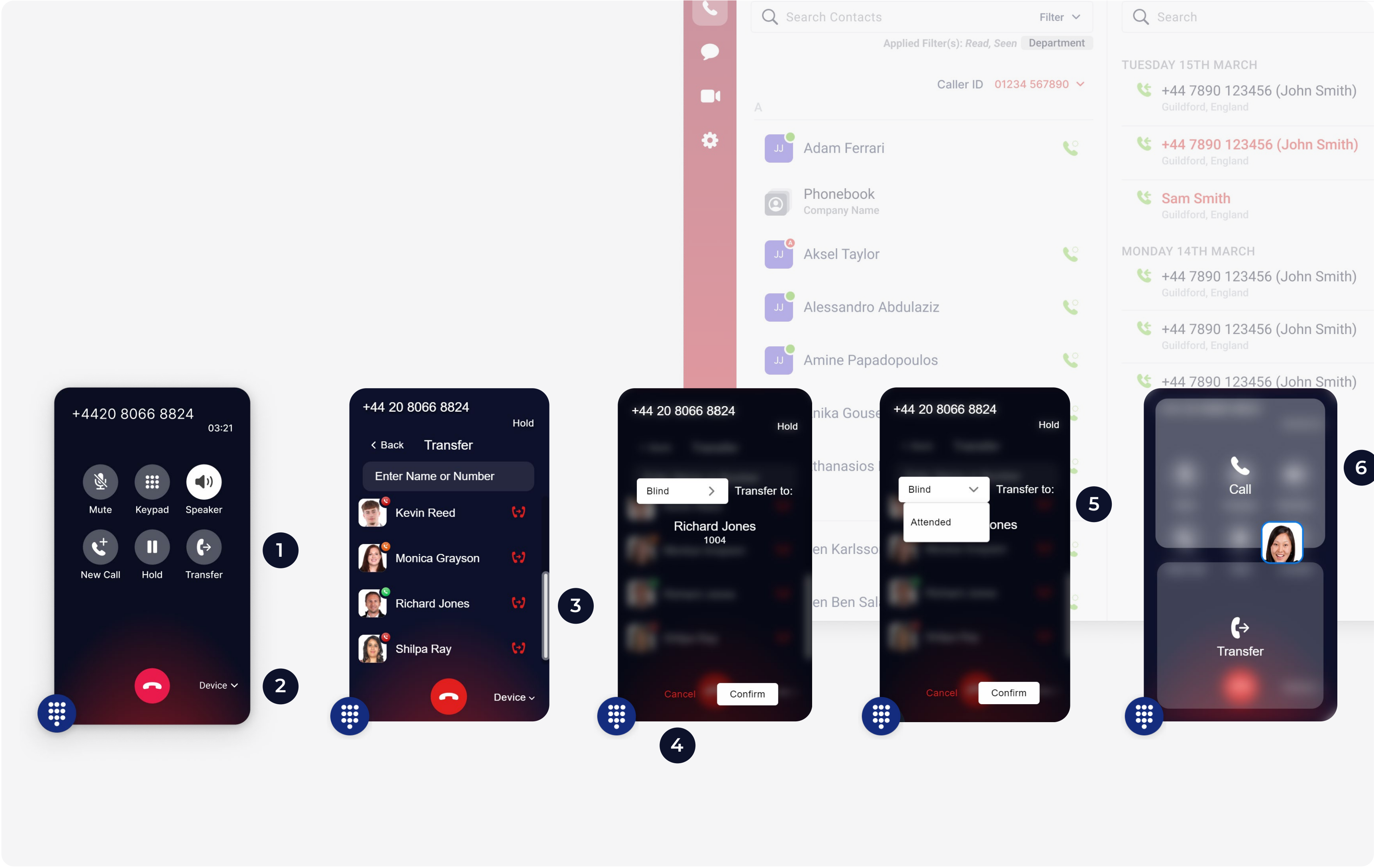
Parking and retrieving a call

When you park a call, the caller is placed on hold until you or another person takes the parked call out of its parking space. Anyone can park or unpark a call, so it's a popular way of transferring calls in a small office where you can see each other. "Hey Richard, there is a call for you parked on 1!"

Note: The default short codes to park/retrieve a call are ***11** (for parking Space 1), ***12** (for parking Space 2), ***13** (for parking Space 3) with ***14** and ***15** for Spaces 4 and 5.

1   When on an active call, you can also start a new call or transfer the active call to an internal contact by dragging and dropping their profile picture from your **Contact** list over to your dialpad.

2   You can either dial the pre-configured short code for the parking space you wish to park the call in or click **Short Codes** to bring up a list of actions.

3   This will present you with a list of short code actions including available parking spaces. Simply select the parking space you wish to use from the list.

4   The call will be displayed in the Parking area of the app and can be retrieved by clicking on the **green** phone icon next to the parked call.
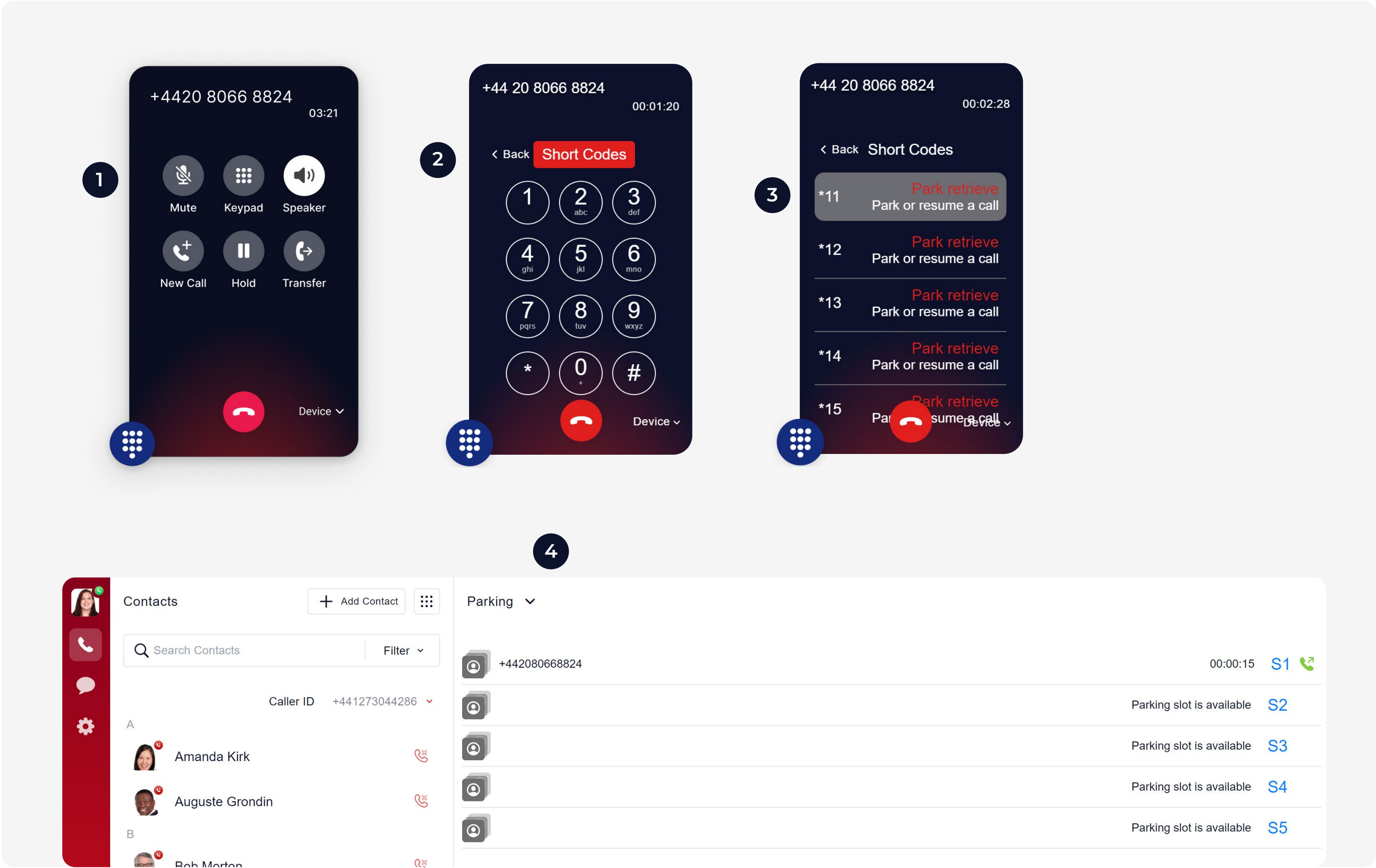
Chat and SMS view

Press the Chats icon from the Menu bar on the left to access the chat area of the app.

1 **Menu Bar**

2 **List of active Chats and SMS conversations**

3 **View chat threads**

4 **Chat Filter**
Filter Read, Unread, Pinned, Muted and Type

5 Close the chat with the **X**, **Call** the Chat Contact by clicking on the **green** phone icon or view chat information by clicking the ellipsis.

6 **Chat input box**

    e Attach file

    f Add Emoji

    g Record voice note

    h Advanced formatting options

    i Send button

7 **Reply options**

8 **Start new Chat**

Chat & SMS

+ New Chat

Search Chat   Filter ⌄

CHATS

Richard Jones   16:01
Sure, no problem. Would 2pm work for...

Auguste Grondin   Tue 16:50
Hi Auguste - Do you have that October...

Amanda Kirk   Tue 16:49
Hey Amanda! How was your weekend...

Richard Jones

02 November 2023

This is the start of the conversation with Richard Jones.

November 2023

Hi Monica, can we have a quick chat before that meeting today?
16:20

Today

Sure, no problem. Would 2pm work for you? 👍
16:01

Message Richard Jones

Starting a New Chat and creating Chat Groups

1 To begin a new chat with a Contact, go to Chats from the menu on the left and select **+ New Chat**.

2 A pop-up box will appear to **Search Contacts**. Enter the name of the individual you wish to chat with and click **Start Chat** to begin chatting. You can also search for an existing Chat Group to join.

3 To create a new **Chat Group**, simply add more people in the **Search Contacts** area. You will be prompted to create a name for your group and you can then click **Create Group** to begin chatting.

Note: If you're in a group with someone, you can mention them in a message by typing the "@" followed by their name.
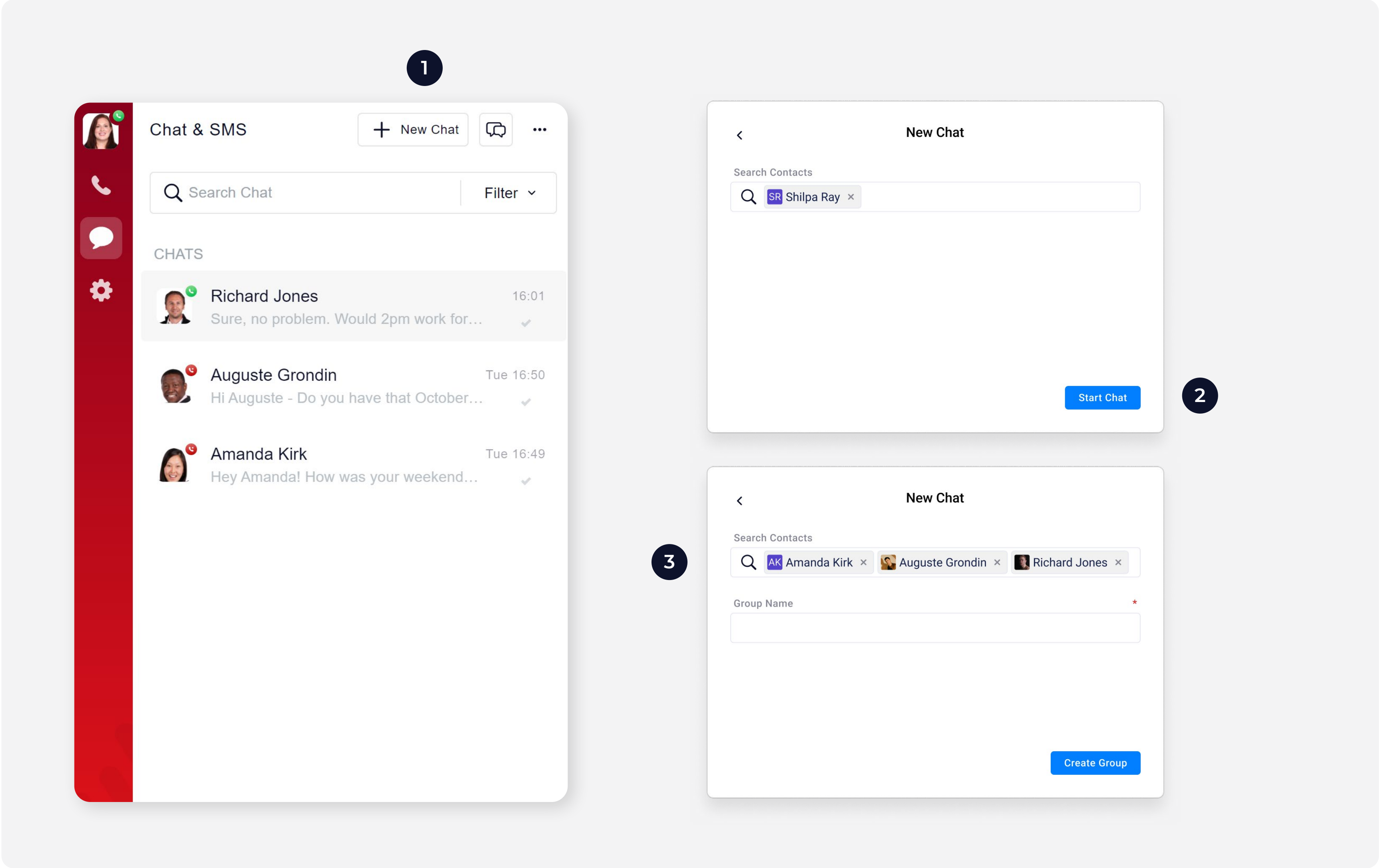
1

Chat & SMS   + New Chat

Search Chat   Filter ⌄

CHATS

Richard Jones   16:01
Sure, no problem. Would 2pm work for…

Auguste Grondin   Tue 16:50
Hi Auguste - Do you have that October…

Amanda Kirk   Tue 16:49
Hey Amanda! How was your weekend…

2

New Chat

Search Contacts

SR Shilpa Ray ×

Start Chat

3

New Chat

Search Contacts

AK Amanda Kirk ×   Auguste Grondin ×   Richard Jones ×

Group Name   *

Create Group

Sending SMS

**1** To send an SMS, click on the ellipsis next to a Contact from the contact list.

2 Select 'Send SMS'. This will start a new chat in the Chat section of the app. Sending and replying to SMS messages works in the same way as a regular chat outlined in the previous section of this guide.

Note: In order to send an SMS, an **Outbound message Caller ID** needs to be set in the Chat settings of the app.
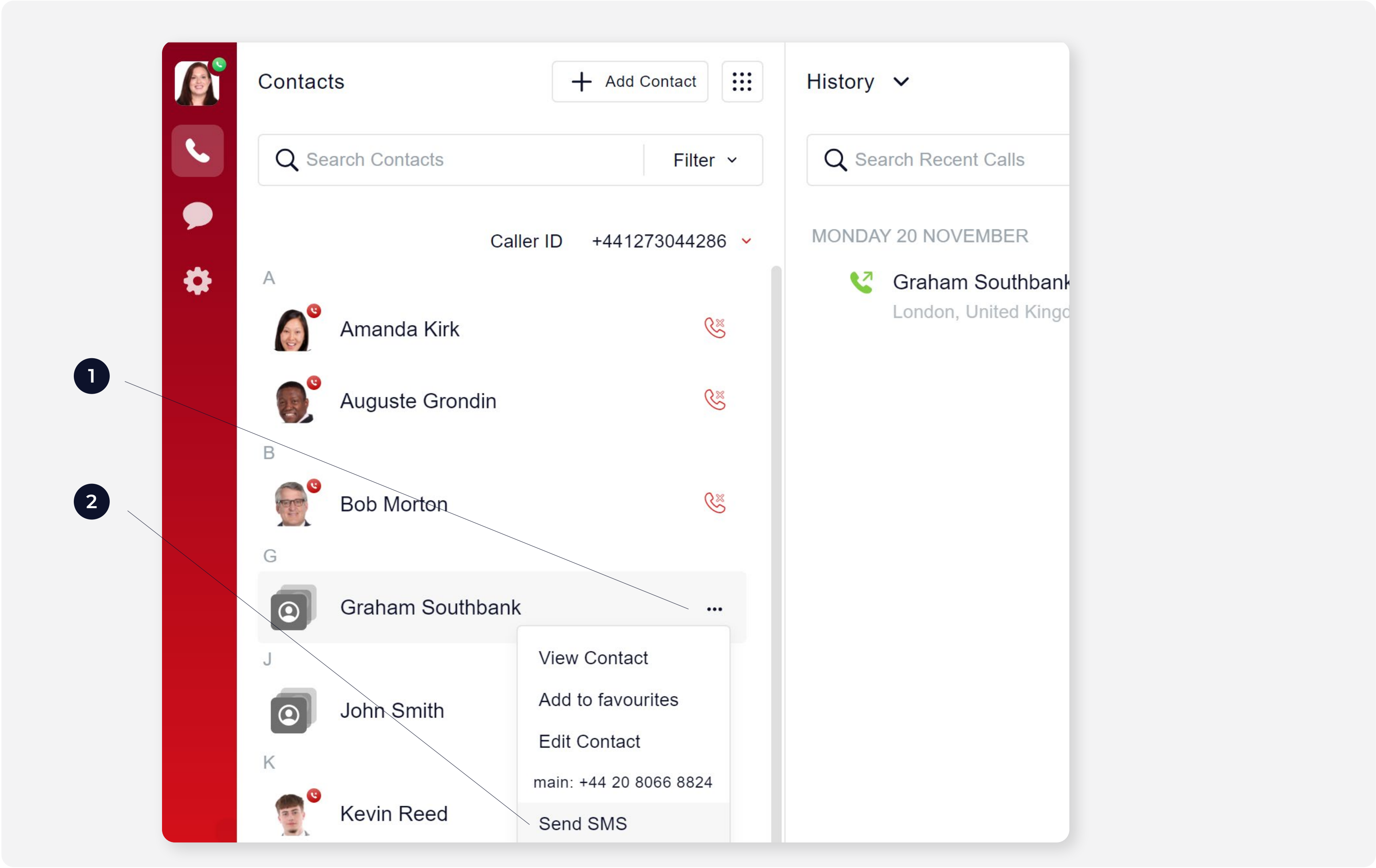
Settings

1. You can adjust the app settings, configuration and set preferences in the **Settings** area of the app.

2. **Account and General** Settings (change your Profile picture, DND devices, change your theme and adjust your chat view - Displayed in the image).

3. **Call** Settings (change the default Caller ID, toggle Recording, Click to Dial, Call Waiting, Forward Calls, set Call Transfer and Park preferences).

4. **Chat** Settings and set SMS Caller ID.

5. **Notification** Settings (adjust chat notifications and volume).

6. **Contact** Settings (sort contacts, choose Phonebooks, CRM contact pops).

7. **Audio** Settings (ringtone, select input/output devices).

8. **Line Key Configuration** - This area of the app will allow you to set up speed dials and BLF keys for a deskphone that is registered to your Extension.

9. **Short Codes** will present a list of short codes that will allow you to quickly enable/disable features by dialling a short sequence of digits.

10. **Log Out** - Log out of your account.

Settings

- Account & General
- Calls
- Chats
- Notifications
- Contacts
- Audio

Line Key Configuration

Short Codes

Log out

Monica Grayson (1001)
All Aboard Ltd.

Change Image

Account
View your account details, active devices list, minutes remaining, and availability.

My devices

Available in Call Queues

Use Global Do Not Disturb

Do Not Disturb

Connected Headset Beta   Connect

Theme
Choose your preferred theme for your interface appearance.

System Default   Light Mode   Dark Mode

Chat View
Choose your preferred chat style.